



Instructions for Gathering Data on Current State

Understanding the current state of your organization (facility, office, workgroup) is essential for you to effectively plan where your organization is headed in the future.

Many experts agree the current state can be described by the analysis of these five areas:

1. **RESOURCES** available
2. **CULTURE** within the organization
3. **ENVIRONMENT** the organization operates in
4. **INTERNAL AND EXTERNAL CUSTOMERS'** needs
5. **MISSION PERFORMANCE** of the organization

Prior to attending the *Strategic Planning* class, please prepare responses for these five areas. **Write/type your responses in note or bullet format.** You should indicate the strengths of your organization (facility, office, or workgroup) and the weaknesses that need to be improved.

RESOURCES: Assess the current state of the following:

- ☐ Human Resources
- ☐ Fiscal Resources
- ☐ Equipment/material
- ☐ Schedules/priorities of current work

CULTURE: Assess the current state of the following:

- ☐ Operating norms
- ☐ Leadership styles
- ☐ Labor management relations
- ☐ Employee recognition
- ☐ Communication flow
- ☐ Sharing of information
- ☐ Receptivity to business management initiatives (e.g., financial accountability, performance-based compensation)
- ☐ The state of morale
- ☐ Organizational values

- ENVIRONMENT:** Assess the current state of the following:
- ☐ External forces, such as local and national politics
 - ☐ Emerging technology
 - ☐ Predictions of demand for your services
 - ☐ Geographical area trends

**INTERNAL AND
EXTERNAL
CUSTOMERS:**

- Assess the current state of the following:
- ☐ Effectiveness of communications
 - ☐ Understanding their needs
 - ☐ Satisfying their needs
 - ☐ Partnerships/alliances
 - ☐ Competition for your product/service

MISSION

- PERFORMANCE:** Assess the current state of the following:
- ☐ The mission of your organization (facility, office, workgroup)
 - ☐ Roles and responsibilities
 - ☐ Quality standards
 - ☐ Work outcome performance measures
 - ☐ Criteria for success
 - ☐ Benchmarking with other organizations

The data you gathered to document your current state should give you a balanced perspective of your program, project, and/or organization. Consider any relevant information that will help you assess the current state.

You will be sharing the highlights of your current state during the upcoming *Strategic Planning* class.